

Part D: Defining Potential Inventory and Systems Needs



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Introduction

This section will show you how to identify “Potential Inventory” and “Systems Deficiencies” for possible inclusion in the LRFP.

POTENTIAL INVENTORY

“Potential inventory” pertains to space changes in your existing Sites, Schools, Assets, or Rooms. Potential inventory records need to be created if you plan to:

- Purchase or lease a new Site.
- Open a new School.
- Build, purchase, or lease a new Building or Site Asset.
- Build, purchase, or lease new rooms.
- Reconfigure existing rooms, resulting in a change in square footage and/or support spaces.

Naming potential inventory does not automatically include it in the LRFP. An action (*purchase, lease, construct, reassign, etc.*) must be assigned to the Potential Inventory item for inclusion in the LRFP. (See *Part F: Creating a LRFP.*)

SYSTEMS DEFICIENCIES

“Systems” pertain to the upgrading of an asset’s infrastructure. Examples of Systems Deficiencies include:

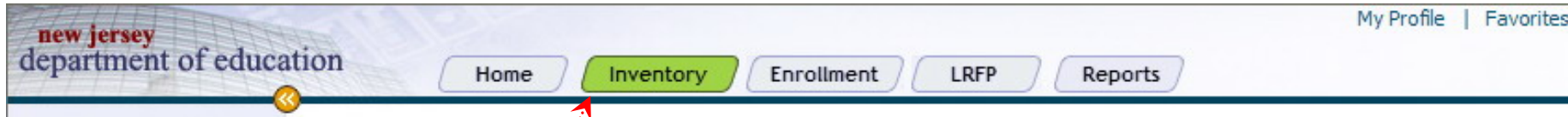
- Replace a building roof.
- Renovate a toilet room for handicapped accessibility.
- Install a new HVAC system.
- Irrigate play fields.

Naming a Systems Deficiency does not automatically include it in the LRFP. The action must be selected for inclusion in the LRFP. (See *Part F: Creating a LRFP.*)

DATA MIGRATION

No system deficiencies or proposed inventory data has been migrated from the previous system.

Accessing Potential Inventory and System Data



Potential Inventory and Systems Upgrades are identified in the “Inventory” section of the website. The Inventory section is accessed by “clicking” on the Inventory Tab from the Main Menu.

Identifying Potential Inventory Needs

Each District should determine changes to its existing inventory that are needed to address capacity and program space objectives.

Inventory changes address space-related problems by adding or altering Sites, Schools, Assets, or Rooms. Districts will need to create new “potential” inventory records for:

- A **Site** that is proposed to be purchased or leased.
- A new **School**.
- An **Asset** (building, playground, play field, or parking lot) that is proposed to be constructed new, purchased, or leased.
- **Rooms** that are proposed to be constructed new, purchased, or leased.
- **Rooms** that are proposed to be reconfigured, resulting in a change to the existing room square footage and/or support spaces.

The “Potential Inventory” of Sites, Schools, Assets, and Rooms should be added to the existing Inventory. No proposed inventory from the previous LRFP has been migrated into the new system. It is critical that inventory changes are carefully reviewed in order to make certain that each school has appropriate capacity to accommodate the proposed enrollments.

CONSIDERATIONS:

- The identification of Potential Inventory does not automatically include it in the LRFP. An action to achieve the inventory item needs to be assigned in the LRFP section of the website. *(See Part F: Creating, Submitting, and Amending a LRFP.)*
- If you access a report prior to assigning an action to achieve a potential inventory item, the potential inventory item will NOT appear or impact the calculations in the reports. *(For example, a potential classroom identified in the Inventory section of the website will not appear in the Proposed Room Inventory Report if it has not been assigned an action in the LRFP section of the website.)*
- You can create Potential Inventory to explore more than one LRFP scenario. Since identifying Potential Inventory does not automatically include it in the LRFP, you can add as many different potential inventory records as desired. You will then only select the applicable records for inclusion when constructing your LRFP. For example, you may want to explore two different building addition scenarios for a school. You would create potential room records under the applicable building asset for *both* scenarios. When constructing the LRFP, you will only assign actions and budgets to the applicable rooms.

Identifying a Potential Site

Add any Site that the district is considering purchasing or leasing.

STEP 1 – Click on the New Icon  from the Site List View or Site Detail View to create a New Site Record. (Note: You can only use the Copy and Paste feature if the Site you are copying has a status of “Potential.” Copy and Paste can be used if you have already created one Potential Site Record and are proposing another Potential Site Record with similar Assets or Rooms.)

STEP 2 – Fill in the required fields. Fields that are marked with a red asterisk (*) are required.

Status: Select “Potential” from the pull-down menu. The status cannot be changed once the record is saved.

Site Name: Enter a name for the Potential Site. It is recommended that Sites be named with the proposed school or asset name followed by the word “Site.” For example, the site for P.S. 1 would be called “P.S. 1 Site.”


Ownership: Select proposed district ownership status from a pull-down menu list.

Acreage: Enter the area of the plot of land in acres. (You may enter the ideal size if the site has not been identified.)

Description: Describe site development restrictions, land characteristics, traffic considerations, etc. Also note if the site location has yet to be identified.

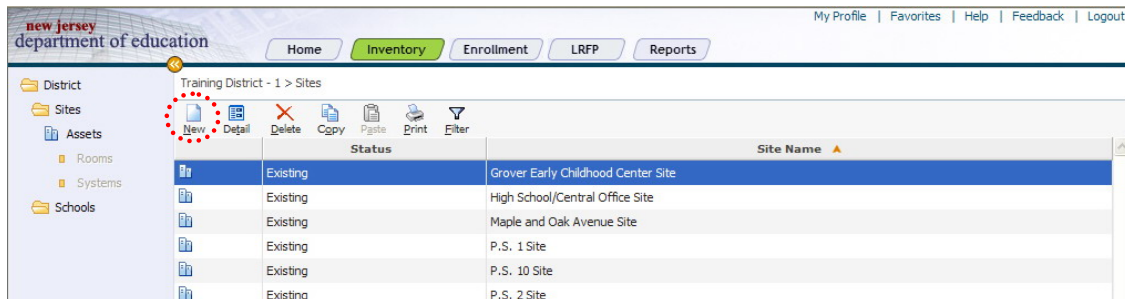
Address: Enter the general site address, if known. This can be left blank for potential sites.

Block/Lot: Enter block/lot(s) for the site, if known. This can be left blank for potential sites.

STEP 3 – Save the Record by “clicking” on the Save Icon .

Don't forget to create Asset Records for any potential buildings, parking lots, play fields, and playgrounds that are located on the potential site.

Site Record – List View









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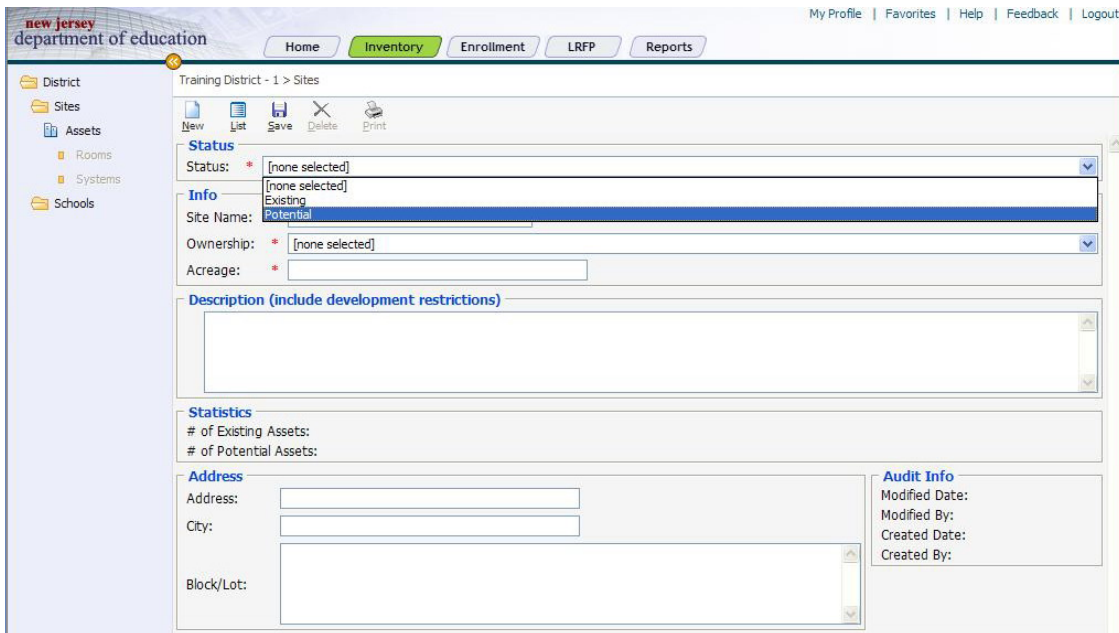
Home Inventory Enrollment LRF Reports

Training District - 1 > Sites

New Detail Delete Copy Paste Print Filter

	Status	Site Name
	Existing	Grover Early Childhood Center Site
	Existing	High School/Central Office Site
	Existing	Maple and Oak Avenue Site
	Existing	P.S. 1 Site
	Existing	P.S. 10 Site
	Existing	P.S. 2 Site

Site Record – Detail View



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Home Inventory Enrollment LRF Reports

Training District - 1 > Sites

New List Save Delete Print

Status

Status: * [none selected]

Info

Site Name: Existing

Site Name: Potential

Ownership: * [none selected]

Acreage: *

Description (include development restrictions)

Statistics

of Existing Assets:

of Potential Assets:

Address

Address:

City:

Block/Lot:

Audit Info

Modified Date:


Modified By:

Created Date:

Created By:

Identifying a Potential School

Add any potential new schools. You do not need to create a potential new School if you are reassigning an existing school to another use, such as changing a middle school to an elementary school. The school can be “reassigned” in the LRFP section. (See *Part F.*)

STEP 1 – Click on the New Icon  from the School List View or School Detail View to create a new School Record (*Note: You can only use the Copy and Paste feature if the School you are copying has a status of “Potential.” Copy and Paste can be used if you have already created one Potential School and are proposing another Potential School with similar Assets and Rooms.*)


STEP 2 – Fill in required fields. Fields that are marked with a red asterisk (*) are required.

Status: Select “Potential” from the pull-down menu.

School Name: Enter the proposed school name.

DOE Code: Enter a preliminary DOE Code in the format “Pxx.” (*For example, P01, P02, etc.*)

FES School Model: Select a FES Model that most closely resembles the grades proposed in the School.

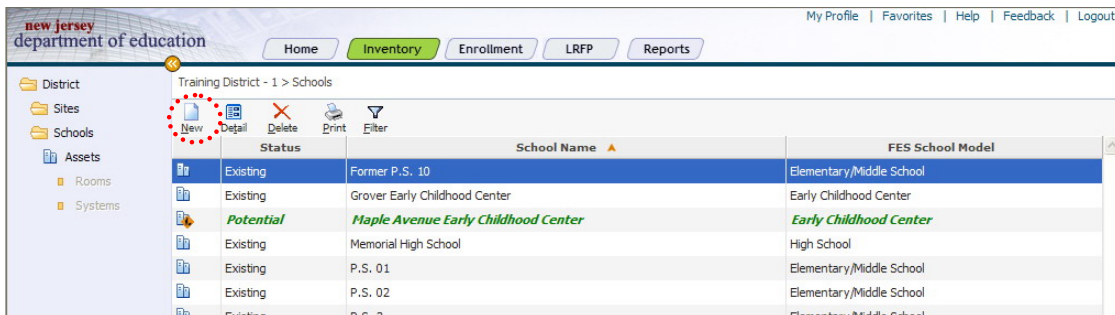
STEP 3 – Save the Record by “clicking” on the Save Icon .

If you are creating a New School from scratch by using the New Icon, remember to identify Assets and Rooms for the School!

If you are copying and pasting a similar Potential School, remember to edit the associated Assets and Rooms for the copied School!

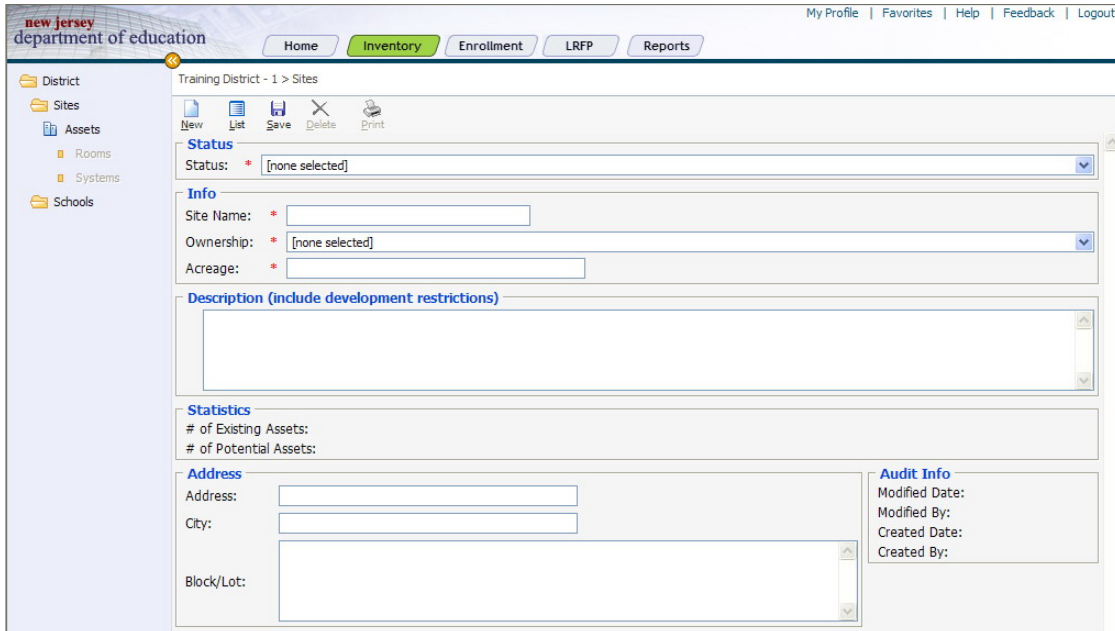
Don’t forget to assign enrollment to the potential School in the LRFP section if you are including it in your LRFP!

School Record – List View



Status	School Name	FES School Model
Existing	Former P.S. 10	Elementary/Middle School
Existing	Grover Early Childhood Center	Early Childhood Center
Potential	Maple Avenue Early Childhood Center	Early Childhood Center
Existing	Memorial High School	High School
Existing	P.S. 01	Elementary/Middle School
Existing	P.S. 02	Elementary/Middle School
Existing	P.S. 3	Elementary/Middle School

School Record – Detail View



Status: * [none selected]

Info

Site Name: *

Ownership: * [none selected]

Acreage: *

Description (include development restrictions)

Statistics

of Existing Assets:

of Potential Assets:

Address

Address:

City:

Block/Lot:

Audit Info

Modified Date:


Modified By:

Created Date:

Created By:

Identifying a Potential Asset

Identify any Potential new buildings, parking lots, playgrounds, and play fields. (The records for the Site and School associated with the Potential Asset must be created first.)

STEP 1 – Navigate to the Asset List View under the appropriate Site in the Blue Navigation Pane on the left side of the screen. “Click” on the New Icon  from the Asset List or Asset Detail View to create a New Asset Record. (Note: You can only use the Copy and Paste feature if the Asset you are copying has a status of “Potential.” This feature should be used if you have already created one Potential Asset and are proposing another Potential Asset with similar characteristics or Rooms.)

STEP 2 – Fill in required fields. Fields that are marked with a red asterisk (*) are required.

Status: Select “Potential” from the pull-down menu.

School Served: Select the School that the Asset serves, if applicable. If more than one School is served, select the most frequent user and note the other School in the Comments field.

Asset Name: Enter a name. It is recommended that the name incorporate the School served if applicable.

Asset Type: Select from the pull-down menu.


Building Use: Select as appropriate from the pull-down menu.

Area (GSF): Enter the total proposed gross square feet of the building, including walls. (This number should coordinate with the proposed room inventory if the asset is an instructional building.)

Ownership: Select proposed district ownership status from a pull-down menu list.

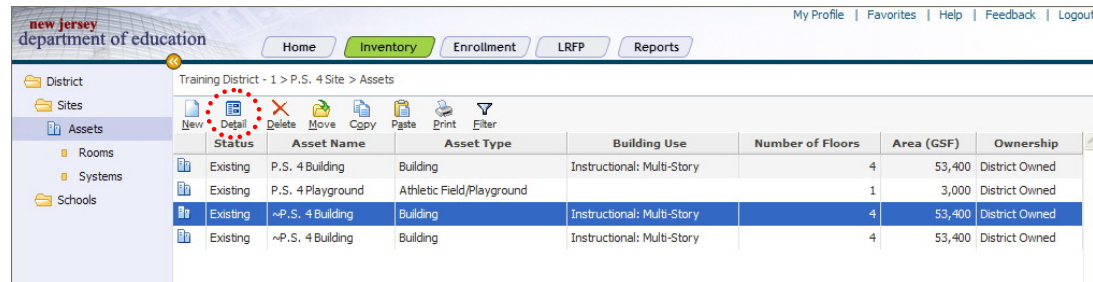
Construction Information, Location and Description: Not applicable for potential assets.

Comments: Enter optional comments. Also see “School Served” above.

STEP 3 – Save the Record by “clicking” on the Save Icon .

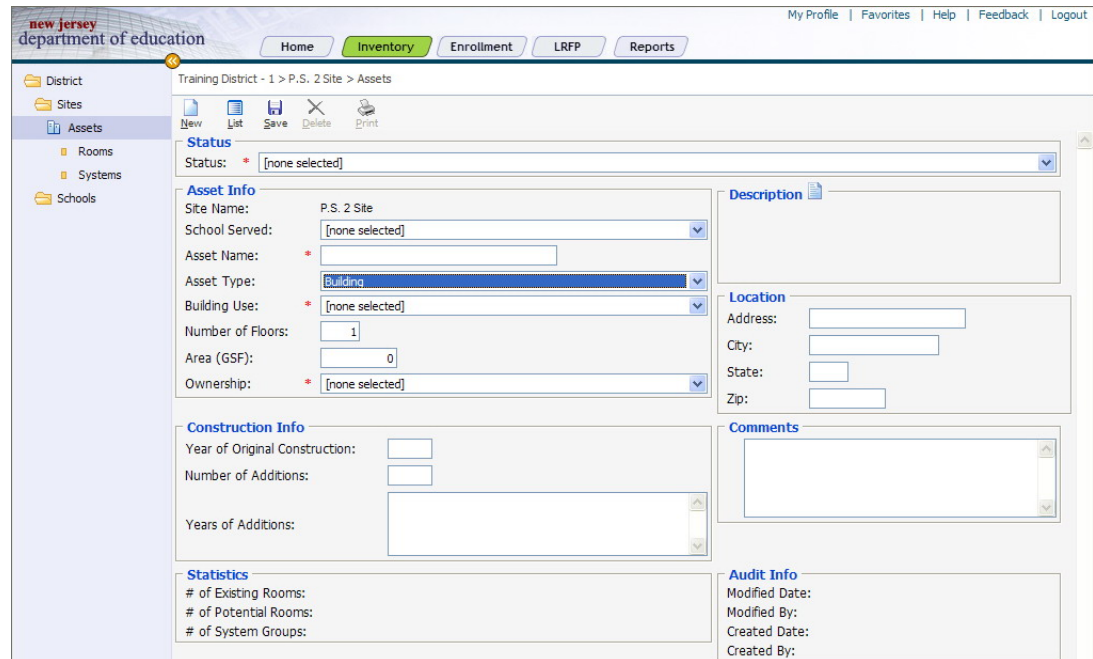
Don't forget to create Room Records for instructional buildings!

Asset Record – List View



Status	Asset Name	Asset Type	Building Use	Number of Floors	Area (GSF)	Ownership
Existing	P.S. 4 Building	Building	Instructional: Multi-Story	4	53,400	District Owned
Existing	P.S. 4 Playground	Athletic Field/Playground		1	3,000	District Owned
Existing	~P.S. 4 Building	Building	Instructional: Multi-Story	4	53,400	District Owned
Existing	~P.S. 4 Building	Building	Instructional: Multi-Story	4	53,400	District Owned

Asset (Building) Record – Detail View



Asset Info

Site Name: P.S. 2 Site

School Served: [none selected]

Asset Name: *

Asset Type: Building

Building Use: * [none selected]

Number of Floors: 1

Area (GSF): 0

Ownership: * [none selected]

Construction Info

Year of Original Construction:

Number of Additions:

Years of Additions:

Statistics

of Existing Rooms:

of Potential Rooms:

of System Groups:

Audit Info

Modified Date:




Modified By:

Created Date:

Created By:

Identifying a Potential Room

Identify any potential rooms that are proposed to be constructed new or be created from reconfiguring walls in existing rooms. The reassignment of existing rooms, such as reassigning an art room to a general classroom, does not have to be identified as Potential Inventory if the room and support space square footage is not altered. (See Part F.)

STEP 1 – Click on the New Icon  from the Room List View in the Site Hierarchy or Room Detail View to create a New Room Record. **-OR-** Copy and Paste a similar Potential Room, by selecting the similar room from the Room List, clicking on the Copy Icon  and then clicking on the Paste Icon .

STEP 2 – Fill in required fields. Fields that are marked with a red asterisk (*) are required.

Status: Select “Potential” from the pull-down menu.

Room Name: Name the room as desired. It is recommended that the room number followed by the room name.

Room Type: Select the appropriate room type from the list.


District Class Size Practices: Enter the district class size practice only if the room is considered to be capacity-generating by the District. (A utilization rate will be applied to the noted class size for the capacity calculations.)

Area (NSF excluding Support Spaces): Enter the proposed net square feet for the room. The NSF excludes walls but includes the area occupied by fixed furniture and equipment.

Quantity: Enter the number of rooms with similar characteristics. future if needed.

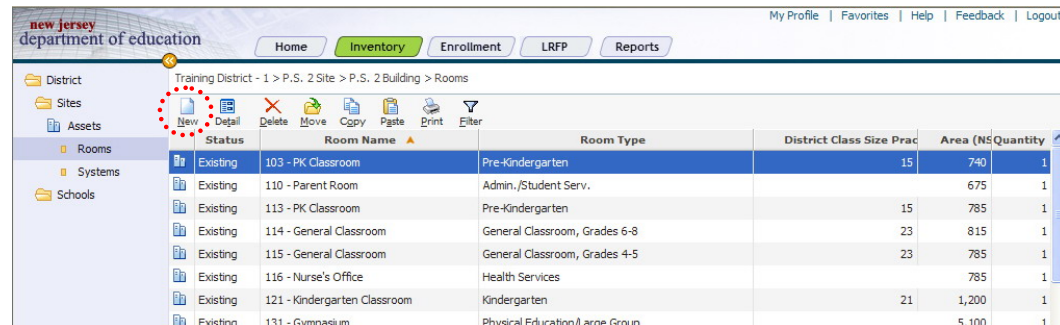
Support Spaces NSF: Enter the sum of the net square feet of each similar support space room type that serves the main room.

Description and Comments: Enter information as desired.

STEP 3 – Save the Record by “clicking” on the Save Icon .

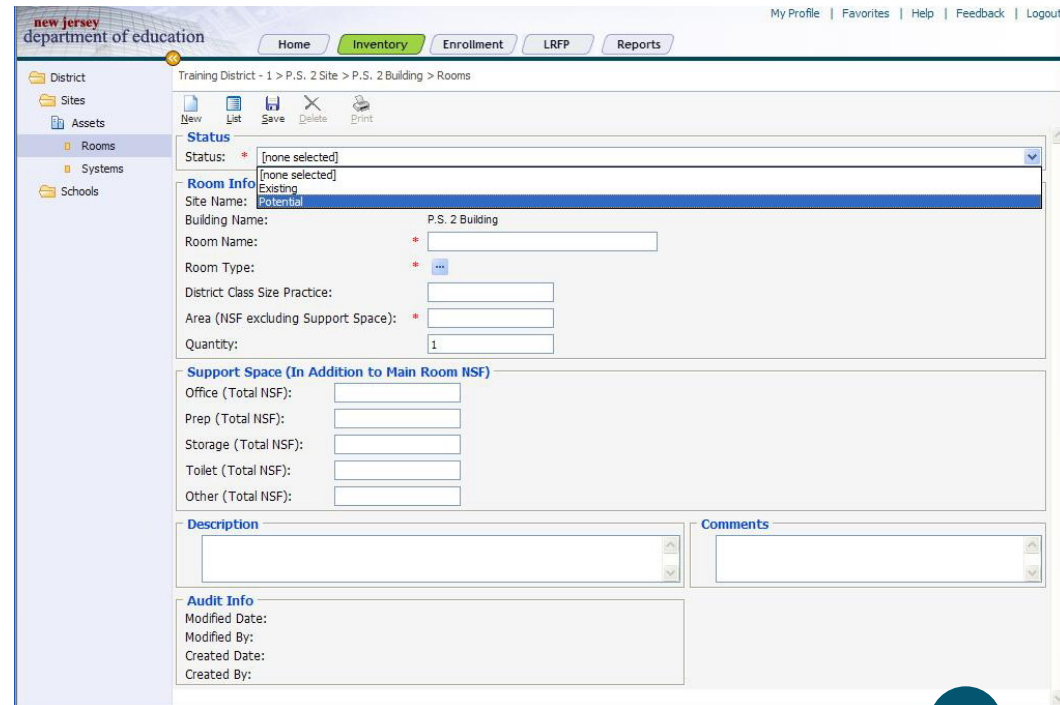
DO NOT delete existing rooms that are proposed to be demolished, reassigned, or reconfigured. They will be assigned “actions” in the LRFP section that will take them off-line. (See Part F.)

Room Record – List View



Status	Room Name	Room Type	District Class Size Prac	Area (NSF)	Quantity
Existing	103 - PK Classroom	Pre-Kindergarten	15	740	1
Existing	110 - Parent Room	Admin./Student Serv.		675	1
Existing	113 - PK Classroom	Pre-Kindergarten	15	785	1
Existing	114 - General Classroom	General Classroom, Grades 6-8	23	815	1
Existing	115 - General Classroom	General Classroom, Grades 4-5	23	785	1
Existing	116 - Nurse's Office	Health Services		785	1
Existing	121 - Kindergarten Classroom	Kindergarten	21	1,200	1
Existing	131 - Gymnasium	Physical Education/Large Group		5,100	1

Room Record – Detail View



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Home Inventory Enrollment LRFP Reports

Training District - 1 > P.S. 2 Site > P.S. 2 Building > Rooms

Status: * [none selected]

Room Info: [none selected]

Site Name: Potential

Building Name: P.S. 2 Building

Room Name: *

Room Type: *

District Class Size Practice:

Area (NSF excluding Support Space): *

Quantity: 1

Support Space (In Addition to Main Room NSF)

Office (Total NSF):

Prep (Total NSF):

Storage (Total NSF):

Toilet (Total NSF):

Other (Total NSF):

Description

Comments

Audit Info

Modified Date:

Modified By:

Created Date:

Created By:

Working with Systems Records

Systems Records identify infrastructure upgrades. System work can be named at the district's discretion and can encompass one or more building systems. Examples of system deficiencies include:

- Replace a building roof.
- Renovate toilet rooms for handicapped accessibility.
- Replace classroom lighting.
- Install a new HVAC system.
- Replace Cafeteria sound system and finishes.
- Replace HVAC system and floor, wall, and ceiling finishes in the kindergarten classroom wing.

System work does NOT change the district's inventory. If a new Asset is created as a result of the proposed work or existing room square footage is proposed to be changed, a "Potential Inventory" record is required.

Only system deficiencies to be included in a LRFP are required to be entered into the website. A building system inventory is not required. Also, creating a systems record does not include it in the LRFP. The system must be selected for inclusion with a systems action, and assigned an estimated budget and project start year. (See *Part F: Creating, Submitting, and Amending a LRFP.*)

In order for a construction project to move forward, projects must be named in the LRFP and selected for inclusion in the Project Application. Therefore, districts should name system actions as appropriate for future anticipated projects. For example, if a district wants to replace the lighting and ceilings in one project, only one Systems Record is required to identify the lighting and ceiling replacement in the LRFP. However, if the district anticipates completing the lighting and ceiling work in two separate projects, two different Systems Records should be created. If a deficiency arises after a district has submitted its LRFP, or a different scope of work is desired, the LRFP must be amended before a district can submit a Project Application.

NOTE: Multiple System Records can be included in a single projection application. However, they cannot be "divided." For example, if you combine lighting and ceiling upgrades in single record in the LRFP, you cannot submit them in separate project applications without amending the LRFP to create separate ceiling and lighting system records.

Adding a New System Record

Only Systems upgrades that you want to include in the LRFP must be identified. You may identify Systems upgrades for any Existing or Potential Asset. No deficiency data has been migrated from the previous LRFP.

To create a new Systems Record:

STEP 1 – Navigate to the Asset List View from the appropriate Site in the blue navigation pane on the left side of the screen. (In the example illustrated to the right, we have navigated to the Asset List for P.S. 3 Site.) Highlight the Asset Record for which you would like to create a deficiency. (P.S. 3 Building in the example.)

STEP 2 – “Click” on the word “Systems” in the Blue Navigation Pane. When you first access the System List View for an Asset, there will be no Records since previous LRFP deficiency data has not been migrated. The example to right shows Systems Deficiency Records have been created for the P.S. 3 Building for the 2005 LRFP.


STEP 3 – “Click” on the New Icon  to create a new System Record. Fill in the required fields. Fields that are marked with a red asterisk (*) are required fields.

Group Name: Name the Systems Deficiency. The name should be descriptive of the proposed work and can encompass one or more building systems. Some examples are:

- Replace roof.
- Comprehensively replace HVAC system.
- Replace lighting and ceiling finishes in East Wing.
- Upgrade toilet rooms for handicapped accessibility.

Please note that work proposed in a Project Application will be selected from the LRFP. Therefore, the work should be named and grouped in a manner consistent with likely future projects. (Districts will also be able to amend their plans.)

System Checkboxes: Check all of the systems that will be involved in the correction of the deficiency.

STEP 4 – Save the Record by “clicking” on the Save Icon .

Assets– List View


Status	Asset Name	Asset Type	Building Use	Number of Floors	Area (GSF)	Ownership
Existing	P.S. 3 Building	Building	Instructional: Multi-Story	4	46,190	District Owned
Existing	P.S. 3 Parking Lot	Parking Lot		1	10,000	District Owned


Systems– List View

Systems– Detail View

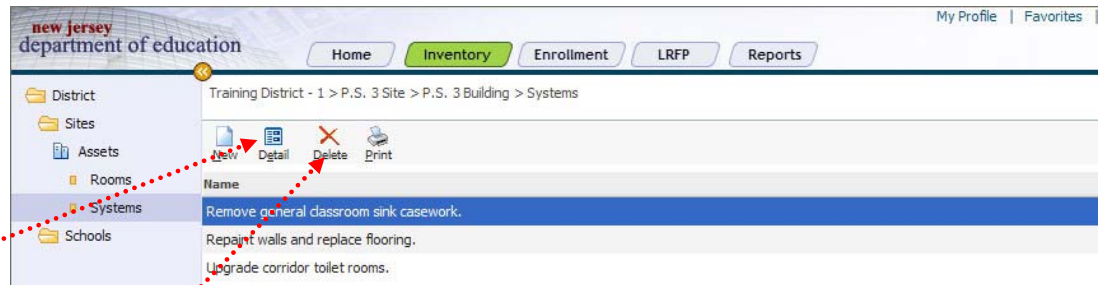
Editing and Deleting Systems Records

Systems Records are manipulated in the same way as other Inventory Records.

To edit an existing System Record: Access the Detail View of the Systems Deficiency Record by highlighting the Record in the List View and “clicking” on the Detail Icon  or by “double-clicking” on the Systems Deficiency Record. See page D.9 for data field descriptions.

To delete a Systems Deficiency Record: Highlight the System Record to be deleted and click on the Delete Icon . Please note that naming a System Action does not automatically include it in the LRFP. (See *Part F* for how to include a System Action in the LRFP.) Therefore, you do not have to delete a Systems Record if you do not want to include it in the LRFP.

Systems– List View



The screenshot shows the 'Systems– List View' interface. The top navigation bar includes 'Home', 'Inventory', 'Enrollment', 'LRFP', and 'Reports'. The left sidebar shows a tree view with 'District', 'Sites', 'Assets', 'Rooms', 'Systems', and 'Schools'. The main content area shows a breadcrumb trail: 'Training District - 1 > P.S. 3 Site > P.S. 3 Building > Systems'. Below this is a toolbar with icons for 'New', 'Detail', 'Delete', and 'Print'. A table lists system records with the following entries:

Name
Remove general classroom sink casework.
Repaint walls and replace flooring.
Upgrade corridor toilet rooms.

Reporting Options on Potential Inventory and Systems Needs

Naming potential inventory items or system needs does not automatically include them in the LRFP. Therefore, if you access a report prior to assigning an action to achieve a potential inventory item or including a system action in the LRFP section of the website, the potential inventory item or system action will NOT appear or impact calculations in the report. For example, a potential classroom identified in the Inventory section of the website will not appear in the Proposed Room Inventory Report if it has not been assigned an action in the LRFP section of the website.